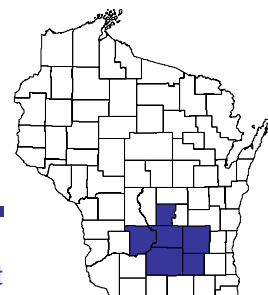


WORKFORCE OBSERVATIONS

for the South Central Wisconsin counties
Columbia, Dane, Dodge, Jefferson, Marquette and Sauk



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Disparate demographic trends in South Central Wisconsin

The outliers

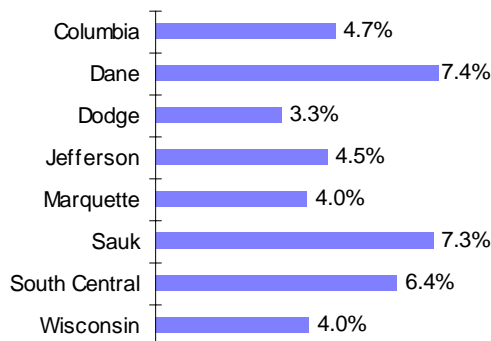
In some ways, Dane and Marquette counties represent the demographic extremes of South Central Wisconsin. Dane is the largest, most densely populated and among the fastest-growing of the South Central counties (see lower left chart). Between 2000 and 2005, births outnumbered deaths by a greater margin in Dane County than anywhere else in South Central Wisconsin. Natural growth (births minus deaths) added roughly 18,222 people to South Central Wisconsin's population in this time period. Dane County accounted for less than 61 percent of the area's population and over 79 percent of the area's net natural change. To a greater extent than many parts of Wisconsin, Dane County tends to attract young people (often student-aged) and other diverse populations. Due to this and other factors, demographers with the Department of Administration's Demographic Services Center project that Dane County will continue to experience robust natural growth and net migration to Dane County for many years to come.

South Central Wisconsin Population		
	2000 Census	Jan 2005 estimate
Columbia	52,468	54,940
Dane	426,526	458,297
Dodge	85,897	88,748
Jefferson	75,767	79,188
Marquette	14,555	15,138
Sauk	55,225	59,266
South Central	710,438	755,577

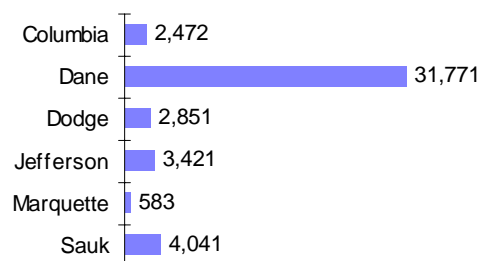
Source: WI Dept. of Admin., Demographic Services Center

Marquette County might expect a slightly smaller population than other South Central counties because it has a slightly smaller land area and because it does not contain or border a metropolitan area. In fact, it is the least densely populated county in the South Central region. Beyond the number of people and the rate of change, it behooves readers to consider the quality of Marquette County's population change. This was the only county of the bunch to experience more deaths than births between 2000 and 2005. Until 2030, demographers project that nearly all of Marquette County's population growth will be attributable to net migration.

Growth rates (Apr 2000 Census to Jan 2005 estimate)



Number of people added (4/2000 Census to 1/2005 est.)



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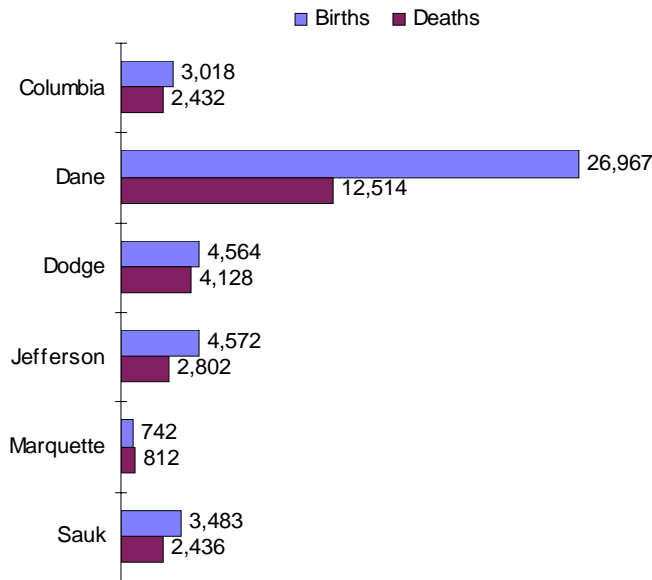
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<http://dwd.wisconsin.gov/oea>

Births and Deaths 2000-2005



Source: Wisconsin Department of Administration, Demographic Services Center

tion rather than natural change. Moreover, the population in every age group under 55 will shrink between now and 2030. Residents 55 or more years old will account for all the population growth. Along with commuting patterns and labor force participation patterns, these trends suggest that the people moving to Marquette County are more likely to be retirees than the workers following jobs. In 2004, nearly 88 percent of Marquette County's new mothers were under 35 years old. As the 55-and-over population becomes a larger share of the overall population, birth rates are unlikely to rise quickly. Natural change trends are far more predictable than migration patterns.

The middle bunch

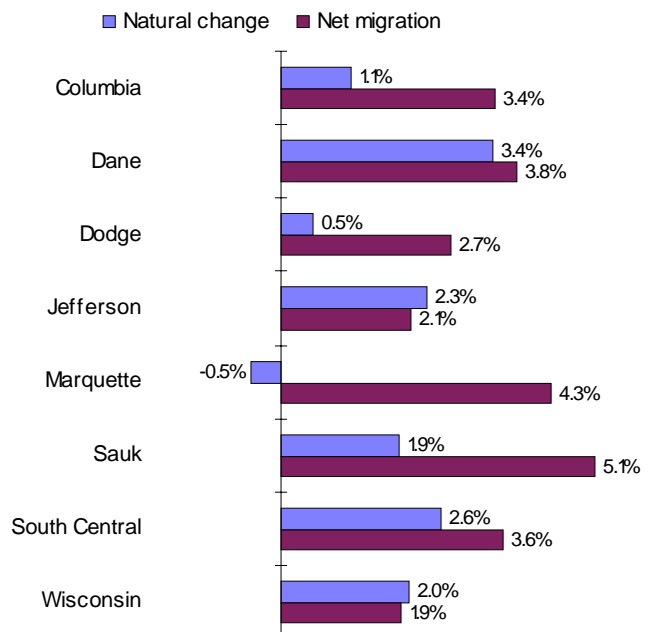
Columbia, Dodge, Jefferson and Sauk counties are somewhere in between the demographic extremes of Marquette and Dane Counties. In some ways, Sauk and Jefferson may lean a bit more toward the Dane County end of the spectrum. Only Dane County had faster population growth than Sauk, and by a narrow margin. (See page 1, lower left graph.) In recent years, the county has added considerably to its hotel, convention and tourism capacity. This probably contributes to South Central Wisconsin's fastest rate of net migration. (See graph to right.) The combined municipalities of Baraboo, Lake Delton and Reedsburg account for 25,804 people (just under 44 percent of Sauk County's population) and added 2,220 people, or nearly 55 percent of the county's population growth. Did the newly-expanded highway 12 help these communities attract new residents or did years of nearby growth make the expansion nec-

essary? Like chickens and eggs, neither trend exists independently of the other.

Jefferson County is wedged between Wisconsin's two largest metropolitan and suburban areas. Perhaps as a result, some of its demographic trends are slightly more like those of metropolitan and suburban areas. Among South Central Wisconsin counties, Jefferson was second only to Dane in terms of natural change rate. (See lower right chart). More than any other South Central County, Jefferson County struck a relatively even balance between natural population growth and net migration. Tourism probably people to live in Sauk County more often than Jefferson County, but both see relatively high concentrations of leisure & hospitality and retail trade employment. The less rural feel may contribute to the younger populations and higher birth rates.

Columbia and Dodge counties might lean a bit more toward the Marquette end of South Central Wisconsin's demographic spectrum. Their births outnumber deaths (see upper left chart), but not by proportional margins as strong as other South Central counties (see lower right chart). Correctional institutions in Portage and Waupun probably restrain birth rates slightly, but also make the counties' populations look younger than they would otherwise be. College campuses in Dane and Jefferson counties have similar effects. Prisons operating over capacity are less likely to contribute to further population growth than college campuses.

Population change components 2000-2005



Source: Wisconsin Department of Administration, Demographic Services Center

In the third quarter (July through September) of 2005, **Columbia County's** unemployment rate remained below its typical levels, but by a narrower margin than in the first and second quarters. **Dane County's** unemployment rate remained low in comparison to most Wisconsin counties and above its typical level for the third quarter.

In the **Madison MSA** (which includes Columbia, Dane and Iowa counties), the professional & business services employment estimate is as high as has been at any point this year and is as far above its year-ago level as it has been at any point this year. The financial activities employment estimate struggled this May through June to keep up with the increases seen last May through June, but rose July through September, instead of falling as it had from July 2004 through September 2004.

Dodge County's unemployment began the third quarter further above its typical level than it began the second quarter. Slower-than-usual winter increases and faster-than-usual decreases in early

spring left the unemployment rate fairly close to its typical level in April. Subsequent months saw slower-than-usual unemployment rate decreases and left the rate just as far above its typical level as it had been last September. The manufacturing employment estimate is further below its year-ago level than it has been at any point in 2005. The information, professional, business & other services employment estimate did not gain as much ground in the third quarter as it had in the first, but remained well above year-ago levels.

Except April, none of the past four quarters have seen **Jefferson County's** unemployment rate as close to their typical levels as the third quarter rates. In each of the last three quarters the information, professional, business & other services employment estimate was above its year-ago level, but estimate shows less over-the-year gain than the previous quarter's estimate. For each of the last four quarters the manufacturing employment estimate has been lower than the previous quarter and lower than the same quarter a year ago.

The first quarter unemployment rate was well below its typical level in **Marquette County** and the second quarter rate was still somewhat below its typical level, but the third quarter rate was slightly above its typical level. Over the last four quarters the manufacturing employment estimate has risen and fallen at slightly different times and to slightly different degrees than in the previous four quarters, but it now sits at almost exactly the same level as at this time last year.

In the first quarter, **Sauk County's** unemployment rate was well below average and in the second quarter it remained slightly below average. In the third quarter it was somewhat above average. The construction employment estimate did not fall as quickly at the end of this summer as it did at the end of last summer, so it remains further above its year-ago level than it has been at any point this year. The financial activities employment estimate is also as high and as far above year-ago levels as it has been this year.

South Central Wisconsin Unemployment Rates: Typical and Actual (not seasonally adjusted)

		Sep 2004	Oct 2004	Nov 2004	Dec 2004	Jan 2005	Feb 2005	Mar 2005	Apr 2005	May 2005	Jun 2005	Jul 2005	Aug 2005	Sep 2005
Columbia County	Actual	3.6%	3.8%	4.1%	4.3%	5.2%	5.7%	5.2%	4.4%	4.0%	4.2%	3.9%	3.7%	3.5%
	Typical	3.7%	3.8%	4.8%	5.2%	6.6%	7.1%	7.0%	5.5%	4.7%	4.8%	4.1%	4.0%	3.7%
	Difference	- 0.1%	0.0%	- 0.7%	- 0.9%	- 1.4%	- 1.4%	- 1.8%	- 1.1%	- 0.7%	- 0.6%	- 0.2%	- 0.3%	- 0.2%
Dane County	Actual	2.8%	2.7%	2.7%	2.6%	3.2%	3.6%	3.4%	3.0%	3.1%	3.5%	3.1%	2.9%	2.8%
	Typical	2.0%	1.9%	2.0%	1.9%	2.5%	2.8%	2.7%	2.3%	2.2%	2.5%	2.2%	2.1%	2.0%
	Difference	0.8%	0.8%	0.7%	0.7%	0.7%	0.8%	0.7%	0.7%	0.9%	1.0%	0.9%	0.8%	0.8%
Dodge County	Actual	4.2%	4.3%	4.3%	4.4%	5.4%	6.0%	5.7%	4.7%	4.5%	5.1%	4.8%	4.6%	4.2%
	Typical	3.3%	3.4%	3.7%	3.7%	4.9%	5.5%	5.3%	4.4%	4.0%	4.5%	4.3%	4.0%	3.3%
	Difference	0.9%	0.9%	0.6%	0.7%	0.5%	0.5%	0.4%	0.3%	0.5%	0.6%	0.5%	0.6%	0.9%
Jefferson County	Actual	4.0%	3.9%	4.0%	4.2%	5.4%	5.9%	5.4%	4.3%	4.2%	4.4%	4.0%	3.7%	3.6%
	Typical	3.3%	3.1%	3.3%	3.5%	4.5%	4.9%	4.9%	4.1%	3.7%	4.1%	3.7%	3.5%	3.3%
	Difference	0.7%	0.8%	0.7%	0.7%	0.9%	1.0%	0.5%	0.2%	0.5%	0.3%	0.3%	0.2%	0.3%
Marquette County	Actual	4.7%	4.9%	5.7%	6.5%	8.4%	8.7%	8.1%	6.4%	5.6%	5.6%	5.1%	4.8%	4.4%
	Typical	4.4%	4.8%	6.4%	7.2%	9.4%	9.8%	9.6%	7.4%	5.9%	6.0%	4.9%	4.7%	4.4%
	Difference	0.3%	0.1%	- 0.7%	- 0.7%	- 1.0%	- 1.1%	- 1.5%	- 1.0%	- 0.3%	- 0.4%	0.2%	0.1%	0.0%
Sauk County	Actual	3.4%	3.6%	3.9%	4.4%	5.4%	5.9%	5.5%	4.4%	4.0%	3.9%	3.6%	3.4%	3.4%
	Typical	3.2%	3.3%	4.0%	4.4%	5.8%	6.3%	6.2%	4.8%	3.8%	3.9%	3.4%	3.3%	3.2%
	Difference	0.2%	0.3%	- 0.1%	0.0%	- 0.4%	- 0.4%	- 0.7%	- 0.4%	0.2%	0.0%	0.2%	0.1%	0.2%

** Includes labor force participants residing in area. Estimates are **NOT** seasonally adjusted. Current month estimates are preliminary and subject to revision. Numbers 2,000 and greater are rounded to nearest 100. Numbers under 2,000 are rounded to nearest 10. Sub-units may not add to totals due to rounding. Calculations are based on unrounded numbers. Results are rounded. For more information call (608) 242-4885 or email dan.barroilhet@dwd.state.wi.us.

South Central Wisconsin Employment-by-Industry Estimates - not seasonally adjusted

	Wisconsin			Madison MSA		
	Jul-Sep 2005 average	Change from Jul- Sep 2004	Change from Jul- Sep 2004	Jul-Sep 2005 average	Change from Jul- Sep 2004	Change from Jul- Sep 2004
Total jobs, all industries*	2,849,100	0	0.7%	342,500	0	1.6%
Const., min'g & nat. resources	146,900	0	3.7%	17,600	- 230	- 1.3%
Manufacturing	508,400	- 700	- 0.1%	32,400	170	0.5%
Trade (w wholesale & retail)	433,500	- 870	- 0.2%	51,600	- 30	- 0.1%
Transport, Wrhsing, Utilities	108,000	370	0.3%	8,600	70	0.8%
Financial activities	159,600	1,330	0.8%	28,500	1,100	4.0%
Education & health services	380,600	0	1.3%	35,400	1,530	4.5%
Leisure & hospitality	273,600	0	1.5%	29,200	- 1,330	- 4.4%
Info, prof, bus. & other srvcs	448,900	0	1.3%	61,700	0	7.1%
Government	389,700	- 970	- 0.2%	77,400	- 100	- 0.1%
	Dodge			Jefferson		
	Jul-Sep 2005 average	Change from Jul- Sep 2004	Change from Jul- Sep 2004	Jul-Sep 2005 average	Change from Jul- Sep 2004	Change from Jul- Sep 2004
Total jobs, all industries*	35,200	110	0.3%	37,300	30	0.1%
Const., min'g & nat. resources	2,500	0	- 0.1%	1,780	100	5.7%
Manufacturing	10,800	- 140	- 1.3%	9,600	- 410	- 4.1%
Trade (w wholesale & retail)	4,600	200	4.6%	6,300	80	1.4%
Transport, Wrhsing, Utilities	880	- 20	- 2.0%	1,190	10	1.1%
Financial activities	840	10	1.1%	1,010	30	3.0%
Education & health services	4,300	70	1.7%	4,500	0	0.0%
Leisure & hospitality	2,600	- 20	- 0.9%	3,400	- 50	- 1.5%
Info, prof, bus. & other srvcs	3,500	100	3.0%	5,700	110	2.1%
Government	5,200	- 90	- 1.6%	3,900	150	4.0%
	Marquette			Sauk		
	Jul-Sep 2005 average	Change from Jul- Sep 2004	Change from Jul- Sep 2004	Jul-Sep 2005 average	Change from Jul- Sep 2004	Change from Jul- Sep 2004
Total jobs, all industries*	4,000	30	0.8%	39,100	700	1.8%
Const., min'g & nat. resources	230	- 30	- 11.8%	2,500	170	7.1%
Manufacturing	1,240	10	0.5%	6,900	70	1.0%
Trade (w wholesale & retail)	480	- 10	- 1.4%	6,300	- 40	- 0.6%
Transport, Wrhsing, Utilities	70	0	0.5%	710	- 10	- 2.1%
Financial activities	140	10	5.6%	1,960	270	16.0%
Education & health services	340	10	2.0%	3,500	30	1.0%
Leisure & hospitality	540	20	3.9%	9,500	500	5.6%
Info, prof, bus. & other srvcs	360	20	7.2%	3,100	- 100	- 3.1%
Government	650	10	1.0%	4,600	- 190	- 4.0%

*Includes jobs with employers in area. Estimates are NOT seasonally adjusted. Current month estimates are preliminary and subject to revision.
 Numbers 2,000 and greater are rounded to nearest 100. Numbers under 2,000 are rounded to nearest 10. Sub-units may not add to totals due to rounding.
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